

# Facilities Work Request System

## User Guide

(for processes inside and outside of Maximo)

Facilities Management & Logistics (FM&L)

### **Overview**

The **Facilities Management & Logistics (FM&L)** group uses **Work Requests** as the primary means to generate work orders for Corrective Maintenance (CM), improvements (MOD) and Capital Project (CP) work performed at Jefferson Lab facilities. Preventive Maintenance (PM) work is set up to automatically generate work orders at scheduled intervals. **Maximo** (an asset management life cycle and workflow process management system), along with **front-end web applications**, is used to create, manage, resolve, and report on these work requests. The goal of this document is to provide an overview of the processes available inside and outside of Maximo to accomplish this. The FM&L website <u>https://www.jlab.org/facilities/facilitieshome</u> has useful resources and fillable forms along with a "WORK REQUEST SYSTEM" button at the top that you can click on to access the Work Request selection website (see <u>next page</u>).

	WORK REQUEST SYSTEM	1 FM WEATHER PAGE
ering		
ty	FACILITIES MANAGEMENT &	LOGISTICS
ity	Facilities Management & Logistics is responsible	for performing or specifying performance of all Jefferson Lab facility maintenance,
ability	construction, security, property, and facility service	es.
	The lab's 206-acre campus includes 169 acres ow Universities Research Association. In addition, the Associated Research Campus (VARC) that the DC	ned by the U.S. Department of Energy and 37 acres owned by the Southeast a Commonwealth of Virginia owns an 5-acre parcel referred to as the Virginia DE leases for use in support of the lab.
	The lab has 69 DOE-owned buildings (882,990 sq leases (17,549 square feet).	uare feet), two state-leased buildings (37,643 square feet), and two off-site warehouse
	Additionally, the lab leases office and lab space ( Center (ARC), which was constructed by the City	11,097 square feet) from the City of Newport News located in the Applied Research of Newport News adjacent to the lab's campus.
	Resources	Fillable Forms
	Subcontractor Forms	Leave Request Form     Off Marries Funct Report
	<ul> <li>Emergency Management</li> <li>Environment, Health &amp; Safety</li> </ul>	Blind Penetration Permit
	Hendy FM Links	Digging/Excavation Permit
	Key People to Contact	Foreign National Information Sheet
	Material Handling Equipment	Generic Security Plan     Het West Report
	• Site Flans	Key Request
	<ul> <li>Aerial Photo</li> </ul>	Lost Key Report
	<ul> <li>Master Plan</li> </ul>	Relocatable Structures Permit
	US Postal Suites & Internal Mailstops	<ul> <li>Subcontractor Registration</li> </ul>
	Utility Outages	After-Hours Guard Instructions
	Vehicle Motor & Equipment Procedures      Vehicle Reservation Procedure	Electrical Job Briefing and Planning Guidelines     Electrical Job Briefing and Planning Charlefint
	Vehicle Inventory	Electrical dob briefing and Hamming Checkinsc
	Weather Station	Facilities Policies and Work Rules
	Walking Trail Map	After-Hours Work Events
	Recycling (posted February 2017)	ARC Tenants Orientation
	• Paper Materials (print out)	Electrical Safety
	o Glass, Metal, Plastics (print out)	<ul> <li>What FM Personnel Should Know</li> </ul>
	<ul> <li>Delivery and Receiving Route</li> </ul>	Work Request/Maximo User Guides
		<ul> <li>JLab Facilities Work Request System User Guide</li> <li>JLab Maximo Work Request System Overview</li> </ul>



#### Your Open Created Work Orders

Wo Num	Date Reported	Status	Group	Description of Work
414670	4/8/19 3:13:33 PM	APPR	FMM	External AC at bldg 89 has blades exposed
414136	4/3/19 3:20:53 PM	APPR	FMM	Water leak coming from ceiling going into the vault
408445	3/28/19 9:11:27 AM	WSCHWO	FMO-S	Bay door won't close
399164	2/12/19 9:11:02 AM	FLDWRKCOMP	FMM	Data Center Room F112B A/C not cooling - same issue again
389845	12/18/18 11:22:44 AM	WMATL	FMM	Low LCW Supply Pressure alarm
366520	7/5/18 2:52:13 PM	APPR	FMO-S	Can hear water pouring inside the wall

#### Your Open Requests

Ticket ID	Date Reported	Status	Description of Work
≥ <u>70510</u>	4/8/19 3:13:33 PM	WORKING	External AC at bldg 89 has blades exposed
€ <u>70458</u>	4/3/19 3:20:53 PM	WORKING	Water leak coming from ceiling going into the vault
<u> <del>70368</del> </u>	3/28/19 9:11:27 AM	WORKING	Bay door won't close
■ <u>70145</u>	3/15/19 1:10:43 PM	WORKING	Key Request Form: 83663
≥ <u>69646</u>	2/12/19 9:11:02 AM	WORKING	Data Center Room F112B A/C not cooling - same issue again
€ <u>69300</u>	1/17/19 2:29:48 PM	WORKING	Portable heater needed for GTS control room
<mark>∋</mark> 68993	12/18/18 11:22:44 AM	WORKING	Low LCW Supply Pressure alarm
€ <u>66728</u>	7/5/18 2:52:13 PM	WORKING	Can hear water pouring inside the wall

This website can also be accessed here: <u>https://misportal.jlab.org/work/index.jsf</u>. Select "Submit Work Request" for facilities maintenance related issues, "Property Request" to relocate/transfer/excess a property item, or "Key Request" for a new key. Your open requests and work orders are displayed at the bottom of the page.

### **Facilities Management & Logistics Website**

FACILITIES MANAGEMENT	WORK REQUEST SYSTEM	1	FM WEATHER PAGE				
Engineering							
Property	FACILITIES MANAGEMENT &	LOGISTICS					
Security	Facilities Management & Logistics is responsible	for performing or s	♥ pecifying performance of all Jefferson Lab facility maintenance,				
Sustainability	construction, security, property, and facility servic	es.					
	The lab's 206-acre campus includes 169 acres owned by the U.S. Department of Energy and 37 acres owned by the Southeast Universities Research Association. In addition, the Commonwealth of Virginia owns an 5-acre parcel referred to as the Virginia Associated Research Campus (VARC) that the DOE leases for use in support of the lab.						
	The lab has 69 DOE-owned buildings (882,990 square feet), two state-leased buildings (37,643 square feet), and two off-site warehouse leases (17,549 square feet).						
	Additionally, the lab leases office and lab space (11,097 square feet) from the City of Newport News located in the Applied Research Center (ARC), which was constructed by the City of Newport News adjacent to the lab's campus.						
	Resources	Fillable Fo	rms				
	<ul> <li>Subcontractor Forms</li> <li>Emergency Management</li> <li>Environment, Health &amp; S</li> <li>Handy FM Links</li> <li>Key People to Contact</li> <li>Material Handling Equipment</li> <li>Site Plans <ul> <li>Aerial Photo</li> <li>Master Plan</li> </ul> </li> <li>US Postal Suites &amp; Internal Mailstops</li> <li>Utility Outages</li> <li>Vehicle Motor &amp; Equipment Procedures</li> <li>Vehicle Reservation Procedure</li> <li>Vehicle Inventory</li> <li>Weather Station</li> </ul>	Leave Rec     Off Nomir     Blind Pen     Digging/E     Foreign N     Generic S     Hot Work     Key Reque     Lost Key R     Relocateb     Subcontre     After-Hou     Electrical	quest Form nal Event Report etration Permit ixcavation Permit lational Information Sheet ecurity Plan Permit est Report le Structures Permit actor Registration rs Guard Instructions Job Briefing and Planning <b>Guidelines</b> Job Briefing and Planning <b>Guidelines</b>				
	<ul> <li>Weather Station</li> <li>Walking Trail Map</li> <li>Refuse and Recycling <ul> <li>Recycling (posted February 2017)</li> <li>Recycling (posted February 2017)</li> <li>Paper Materials (print out)</li> <li>Glass, Metal, Plastics (print out)</li> </ul> </li> <li>Delivery and Receiving Route</li> </ul>	Facilities P • After-Hou • ARC Tena • Electrical • What FM Work Requ • JLab Facil • JLab Max	'Olicies and Work Rules rs Work Events nts Orientation Safety Personnel Should Know uest/Maximo User Guides ities Work Request System User Guide imo Work Request System Overview				

Go back to the FM&L website - <u>https://www.jlab.org/facilities/facilitieshome</u>, then click on "Handy FM Links" (shown on next page). It provides more useful links separated into groups for specialized needs.

### Access to Maximo from the Facilities Handy Links Website

FACILITIES MANAGEMENT	WORK REQUE	EST SYSTEM	FM WEATHER PAGE		
Engineering					
Property	FACILITIES HANDY L	INKS			
Security	The Lab				
Sustainability	Staff Search	JLab Phonebook	All Staff Memos		
Feedback	SAD Calendar	Accelerator Schedule	Cafeteria Menu		
Ourstand Coursesting &	Computer Center CCPR	Computer Center Services	Telecommunications		
Feedback (internal only)	Insight / Timesheet	MIS Apps / Regs	Business Services		
	Stockroom	ES&H Manual	ES&H Manual Forms		
	Training/JList	Admin Manual	Procurement		
	Atlis	Outage Management System	Safety Observations		
	JLab Drawings	Event Investigation Process	Snow Removal Plan		
	Rad Worker Training	CharePoint Home *NFW/*			
	My Work Orders in Maximo (Limited access) Work Orders - Subcontractor ( Basic Site Plan (leyers not supported in some brow	outside of Maximo Connection sers; use Adobe Reader or BlueBeam)	o Facilities Information Center Custom Work Order Search Upcoming PMs for Group (select group, start/end dates to view upcoming PM release and due dates)		
	TRs Your Pending Registrations to	Sign (click on Entry ID #, scroll down, hi	it "Sign", hit back arrow to repeat)		
	Helpful TR Links	TR Re;	port		
	(subcontractor registration, training	, and TR procedures) (choose	e TR name to list active subcontractors by contract)		
	Expired Training	Projec	t Report		
	(choose contract(s))	(choose	e projectis)		
	(choose subcontractor(s) and active	/inactive JList status) (choose	intractor Badge Status Report = contract(s)		
	Course Report by Subcontract (choose subcontractor(s), contract(s	tor Subco ), and/orskill(s)) (choose	ntractor Training Taken or Required subcontractor(s) and/or contract(s))		
	Individual Training Status Repo (choose name(s))	ort Foreig (click or	Foreign National Contractors Report (click on a link)		
	Design, Construction and Proj Procedures	ect Management			

From this website, you can click on the "**My Work Orders In Maximo**" link. Unless you have already logged into Maximo, you will be prompted to enter your Maximo user name and password before Maximo will display the **Start Center** page.

### **Maximo Start Center**

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Favorite Ap	plications				Pending Servio	ce Requests 💡	Filter 🖓 📋 🚺 🦚									/*1
					Affected User	Owner Group	Reported Date	Service Request	<u>Status</u>	<u>Summa</u>	N					Target Finish
Se	rvice Requests										]					
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E.	uk Ordar Traskina				Tina Menefee	FM	3/18/19 3:43 PM	70170	PENDING	Relocat	e eyewash					3/22/19 12:00 AM
	nk order fracking				Tina Menefee	FMENG	3/22/19 12:13 PM	70257	PENDING	No roon	n identification on	the FM maps or	the actual door for the AR	C Elevator roo	m	4/19/19 12:00 AM
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ŧ	Pending FM Requests	20	100	-80												
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					Training Hours	for Facilities Man	agement Staff FY'19		Bob Sperlag	178		APPR	9/30/19 12:00 AM		FMO	379091
					Non-Project spe	ecific Project Me	etings and Events FY'1	9	Bob Sperla	128		APPR	9/30/19 12:00 AM		FMO	379092
					Set Chart Optio	ns		-								1 - 2 of 2

The Maximo Start Center will automatically load the Work Requests – known as **Service Requests** in Maximo - for your **work group**.

View the "**Pending Service Requests**" section at the top of the page and click on a row to access the service request details as shown on the next page.

You can exit out of Maximo at any time by clicking on the "**Sign Out**" link in the top right corner of the dark blue bar, which is always visible in every Maximo application.

### **Accept Service Request and Create Work Order**

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Service Request       VDID5       Owner/Supervisor       Image: Service Address       Image: Service Addresservice Address       Image: Service Ad	To print, use paper You will see a box a Once pdf version op	icon for the type of printout you want in light blue toolbar. Onc asking for the print format. Select pdf or report will not out eens, either follow dialog or press the print icon in the pdf too	e new window/tab opens with print version of report, press the print ico put correctly. Jibar.	n in the light blue toolbar	again.				
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Before the service request is accepted, its status is set to "**Pending**".

Click on the "**Route Workflow**" process at the top in the light blue bar to accept the service request and create a work order. The service request status will change from "Pending" to "**Working**", its information will be copied to the work order upon creation, and you will become the owner of both. The next page shows how to access the created **work order** from the service request.

### Access a Work Order from a Service Request

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New Work Request S Find Service Request 👩 🤜 Select Action 💽 🧃 🗟 🥥 🖉 🌳 🥎 🔛		
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3 PRINTING: Please disable any pop-up blockers. You WILL NOT be able to print reports if pop-ups are being blocked.		
To print, use paper icon for the type of printout you want in light blue toolbar. Once new windowlab opens with print version of report, press the print icon You will see a box asking for the print format. Select pdf or report will not output correctly. Once pdf version opens, either follow dialog or press the print icon in the pdf toolbar.	i in the light blue toolbar again.	
Service Request 69524 Owner/Supervisor	Owner Group         FME         Status         WORKING         Attachments	Ø
Address Information		-
Service Address 🔰	City	
Formatted Address	State/Province	
Street Address		
User Information		-
Reported By 15221	Affected Person 15221	
Name Paul Powers >>>	Name Paul Powers	
Phone 7258	Phone 7258	
E-mail powersp@jlab.org	E-mail powersp@jlab.org	
Service Request Details		-
Summary Work by the Facilities LV Tech	Classification FM \ FMI \ ELECTRIC \ ACCESS \ ACCESSR >>>	
Configuration Item 🔊	Description Access Control : Repair/Maintenance	
Target Description	Reported Priority 1 Low	
Details This covers hours of work that should be done by the technician for Access Control and security that is being done by electricians and anoinears	Internal Priority 1 🔎	
and engineers.	Create WO Options CHILD	
- Schedule Considerations - -Explanation: Collecting hours for end of year reporting	Asset >> 10	
	Location COMM >>> Communications Distribution	
- EH&S Considerations -		
-Julia information access framing Requirements, Rad Worker 1, OCH 1 -Other Requirements or Special Conditions: Lock & Tag System(s) [Electrical]	Related Work Orders   > Fiter > .	
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Multiple Accepted acceptions and Plais Elevery 10, 0, 640	e bunka	
javascript: topLevelMenus['shared'].menuClick[''id':'hyperlink0_wotrack', 'teg', 'value':''hyperlink0_wotrack', 'target':'mainrec_menus', 'event':'click']);	Sequence Mark Progress? Site	

Now that the service request has been accepted and its status set to "Working", you can click on the **double right arrows** beside the **Work Order #** in the lower right to access the work order.

### **Search for a Service Request**

🔊 Service Requests			P Bulletins: (0) 🖗 Go To 🔟	<u>R</u> eports 🖞 Start <u>C</u> enter 🌡 <u>P</u> rofile 🕺 <u>S</u> ign Out	<u>?H</u> elp III.
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Service Requests 🛛 🛩 Fiter 🥁 🖉 🖓 🖉 🔅 🖓 🗌 🔅 🖉 🖉 🖉 Service Requests					🕞 Download   🗖
Service Request 🖕 Summary <u>Reported By Name</u>	Reported Date	Priority <u>Status</u>	Owner	<u>Owner Group</u>	
		P			»
To find record	ds, use the filter fields and then press Enter. For more sea	rch options, use the Advanced Searc	ch button. To enter a new record, select the Insert icon in the	toolbar.	

Click on "**Start <u>C</u>enter**" at the top right in the dark blue bar. Then click on the "**Service Requests**" link on the left side panel. The Service Request search screen will be displayed as shown above. Type in key word(s) in any of the blank fields and press "**Enter**" or click on "**Advanced Search**" and type in key word(s) in the blank fields, click on the **double right arrows** to select values, and/or select key word(s) using the **magnifying glass symbols**. Then click on the "**Find**" button.

The resulting search list will display how many items were found and let you see 20 items per page by clicking on the **left and right arrows** in the medium blue bar. You can also download the list to an excel file for easier searching by clicking on the **`Download**" link on the right side of the medium bar.

Sort the list by clicking on any of the **underlined field headings**. Hover over a service request number to see an underline appear under it. Click on it to access the service request contents.

### Add Information to a Work Order Outside of Maximo



Go back to <u>https://www.jlab.org/facilities/handylinks</u>, then click on the "**WORK REQUEST SYSTEM**" button at the top of the page or click on the "**My Work Orders outside of Maximo**" link. This will allow you to easily see your open work orders without logging into Maximo to search for them. See the following pages for details.

### Access Your Work Requests Outside of Maximo

**Jefferson Lab** Work Request System

# Facilities Management

Welcome, sippel

Home My Work

Subcontractor Work

SRF Work

Logout

If this is an emergency, please call Security at x5822 or Facilities Management at x7400

For all non-emergency requests, please select one of the following choices, submit the appropriate information, and your request will be routed to the correct work group by Facilities Management.

#### Submit Work Request

Property Request Key Request

#### Your Open Created Work Orders

Wo Num	Date Reported	Status	Group	Description of Work
414136	4/3/19 3:20:53 PM	APPR	FMM	Water leak coming from ceiling going into the vault
414121	4/3/19 12:14:25 PM	APPR	FMO-P	Water pouring through light fixture onto electrical equipment
408445	3/28/19 9:11:27 AM	WSCHWO	FMO-S	Bay door won't close
399164	2/12/19 9:11:02 AM	FLDWRKCOMP	FMM	Data Center Room F112B A/C not cooling - same issue again
389845	12/18/18 11:22:44 AM	WMATL	FMM	Low LCW Supply Pressure alarm
366520	7/5/18 2:52:13 PM	APPR	FMO-S	Can hear water pouring inside the wall

#### Your Open Requests

Ticket ID	Date Reported	Status	Description of Work
≥ <u>70458</u>	4/3/19 3:20:53 PM	WORKING	Water leak coming from ceiling going into the vault
≥ <u>70451</u>	4/3/19 12:14:25 PM	WORKING	Water pouring through light fixture onto electrical equipment
€ <u>70368</u>	3/28/19 9:11:27 AM	WORKING	Bay door won't close
€ <u>70145</u>	3/15/19 1:10:43 PM	WORKING	Key Request Form: 83663
≥ <u>69646</u>	2/12/19 9:11:02 AM	WORKING	Data Center Room F112B A/C not cooling - same issue again
€ <u>69300</u>	1/17/19 2:29:48 PM	WORKING	Portable heater needed for GTS control room
≥ <u>68993</u>	12/18/18 11:22:44 AM	WORKING	Low LCW Supply Pressure alarm
€ <u>66728</u>	7/5/18 2:52:13 PM	WORKING	Can hear water pouring inside the wall

Click on the "**My Work**" link at the top of the page to list your open work orders (see next page).

### List Your Open Work Orders Outside of Maximo

The "My Work" screen lets you fill in/select items in the search boxes. Hold down the "Ctrl" key and press the left mouse button to choose multiple items in a selection box. Hit the "Search" button to display the results. Hit the "Reset" button to clear out the search items. Once you perform a search, you can save your search results by clicking on the "Save Search Results" link below these buttons and reload them at any time later using the "Load Saved Search" link in the left grey panel.

MENU:	8	FACILITIES W	ORK ORDER TRACKING
Search Workorders Load Saved Search		Use the following fie	lds to search for workorders
Work Request Home		Wo #	
Provide Feedback		Parent Wo #	
		Lead	✓
		Owner	
		Requester	
		Group	ALLEM
		Status	APPR WPCOND CAN
		Work Type	CM CMGT CP
		Location	
		Subcontractor	×
		Target Finish Date	
		Description	
		Search Reset	
		Save Search Results Download Search Res	(will reload search) sults To Excel

Click on the **Download Search Results to Excel**" link to create an excel spreadsheet of the search results.

### Select a Work Order Outside of Maximo

Here is an example search with the results displayed at the bottom of the screen:

MENU:	FA	CILI	TIES V	VORK	ORDEF	RTRACKING								
Search Workorders Load Saved Search	Use	the fo	llowing fi	ields to s	earch for w	vorkorders								
Work Request Home Provide Feedback	Wo	#	. #											
	Lea	d	/#	Phillip St	anley									
	Owr	ner												
	Req	Requester												
	Gro	up		ALLFM FM										
	Stat	us		APPR WPCONI CAN		, ,								
	Work Type													
	Loc	ation												
	Sub	contra	actor		$\sim$									
	Targ	jet Fin	ish Date											
	Description													
	Search Reset													
	Save Dow	Save Search Results (will reload search) Download Search Results To Excel												
	Shov	v 25	entries								Filter By:			
			WO#	SR#	Parent	Description	Group	Status	Work Type	Lead	Owner	Location	Asset	
	0	Edit	399863	69882		Repair Meter	FME	WSCH	CM	Phillip Stanley	John Riesbeck	Experimental Hall C (96)		
	0	Edit	416025	70775		Replace electrical power meters	FME	APPR	MOD	Phillip Stanley	John Riesbeck	Electrical Distribution (ELEC)		
	۲	Edit	420952	70809		North Recombiner area needs additional emergency lights	FME	WSCH	PMF	Phillip Stanley	John Riesbeck	Accelerator Tunnel Floor 1 (999_1)		

Each of the columns can be sorted. The "Filter By:" box can be used to further narrow down search results, but these results are not able to be included in the "**Download Search Results to Excel**" link.

Click on the "+" at the left of each work order to see the work order details. Click on the "Edit" link beside each to open in another window tab. It will display a screen to fill in/select items in the search boxes. Fields without boxes are not changeable. If you need one of these fields changed (ie: Target Finish Date), contact you supervisor/work coordinator to have them update it in Maximo. See next page for edit screen info.

### View/Update Work Order Outside of Maximo

#### **≡** FACILITIES WORK ORDER TRACKING

Go Back/Close	
Print	
WO#: 399863 Description Repair Meter	
SR#: 69882 Status WSCH	
Date Reported: 2/26/2019 Work Type	
Target Finish Date: 9/30/2020	
Requester: Jason Willoughby - 5372	
Asset Group FME	
Parent Wo Category Electrical : Power : Repair/Maintenance	×
Vendor AACTI2	<u> </u>
Priority 1-Low V Multiple Locations	
Refrigerant Type	
Lbs Refrig Added	
Lbs Refrig Recovered	
Material Desc	
reading voltages. Check fuses/CPT. Must be coordinated with Joe A Beaufait during a down in Hall C.	02/21/2020
Communication Log Entry	
- EH&S Considerations - -Minimum Access Training Requirements: Gert	
-Other Requirements or Special Conditions: None	
- Project:	:
- Org:	
Attachments	
Add New Attachment	
Browse No file selected.	
Savo	
Jure 1	
Labor Materials	
Labor Cost Laborer Date Craft HRS Labor Desc Material/Service Cost Material/	Desc Entered By
\$30.59 PSTANLEY 1/22/2020 SHOP 1.0 looked over work aathered fuse to replace one that was blown, waiting till shutdown/om	
\$30.59 DUNLAP 1/22/2020 SHOP 1.0 looked over work gathered fuse to replace one that was blown, waiting till shutdown/pm	
Log Entries Multiple Locations	
Log Entries     Multiple Locations       Create Date     Type     Commenter     Comment       Location     Percentage	

You can attach documents, add or update an asset, vendor, refrigerant information, location, work type and work category, add multiple locations and change the work order status per your group's workflow procedures.

You can add material costs, labor hours, and log entries. Once saved, they will display lower on the page along with previous entries. If there are child work orders, they will be displayed at the bottom of the page.

Hit the "**Save**" button to save your changes. Click on the "**Go Back/Close**" link at the top left corner to exit and remove this window tab. Click on "**Print**" to display a print screen where you can left click on the upper right horizontal  $\equiv$  bars to select the print menu option.

### Add Information to a Work Order in Maximo

ainearing	WORK REQU	JEST SYSTEM		FM WEATHER PAGE
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erations & Maintenance	FACILITIES HANDY I	LINKS		
perty	The Lab			
curity	Co. # Course	II als Phanalasal	L	All Section Andread
stainability	SAD Calcadar		s adula	
	SAD Calendar	Computer Cost	equie	Telesempusications
	Losinht (Timoshart	MIS Area (Base	er Services	Business Capitan
	Stanling of Timesheet	ES & Maguel	3	EU.S. Manual Earne
	Stockroom	Esteri Manual		
	Iraining/JList	Admin Manual		Procurement
	Atlis	Outage Manage	ement System	Safety Observations
	(FM Staff Connection)			
	(FM Staff Connection) Work Orders - Subcontrastor Basic Site Plan (layers not supported in some brow Reader or BlueBeam)	r Connection wsers; use Adobe	Facilities PMs, Pro Upcoming PMs for (select group, start/e release and due date	ojects' Milestones or Group nd detes to view upcoming PM es)
	(FM Staff Connection) Work Orders - Subcontrastor Basic Site Plan (layers not supported in some brow Reader or BlueBeam) SOTRS	r Connection wsers; use Adobe	Facilities PMs, Pro Upcoming PMs for (select group, start/e release and due date	ojects' Milestones or Group nd dates to view upcoming PM es)
	(FM Staff Connection) Work Orders - Subcontrastor Basic Site Plan (layers not supported in some broi Reader or BlueBeam) SOTRS Links for SOTRs (subcontractor registration, trainin	r Connection wsers; use Adobe	Facilities PMs, Pro Upcoming PMs for (select group, start/e release and due date SOTR Report	ojects' Milestones or Group nd dates to view upcoming PM ts)
	(FM Staff Connection) Work Orders - Subcontrastor Basic Site Plan (layers not supported in some brow Reader or BlueBeam) SOTRS Links for SOTRs (subcontractor registration, trainin, Expired Training	y Connection wsers; use Adobe g, and SOTR procedures)	Facilities PMs, Pro Upcoming PMs fo (select group, start/e release and due data SOTR Report (choose SOTR to list Project Report	o <mark>jects' Milestones</mark> or <b>Group</b> nd dates to view upcoming PM es) : active subcontractors by contract)
	(FM Staff Connection) Work Orders - Subcontrastor Basic Site Plan (layers not supported in some brow Reader or BlueBeam) SOTRS Links for SOTRs (subcontractor registration, trainin Expired Training (choose contract(s))	r Connection wsers; use Adobe g, and SOTR procedures)	Facilities PMs, Pro Upcoming PMs for (select group, start/e release and due date SOTR Report (choose SOTR to list Project Report (choose project(s))	p <b>jects' Milestones</b> or <b>Group</b> nd dates to view upcoming PM ts)
	(FM Staff Connection) Work Orders - Subcontrastor Basic Site Plan (layers not supported in some brown Reader or BlueBeam) SOTRS Links for SOTRs (subcontractor registration, training (choose contract(s)) Subcontractor Report (choose subcontractor(s) and activ	r Connection wsers; use Adobe ig, and SOTR procedures) re/inactive JList status)	Facilities PMs, Pro Upcoming PMs for (select group, start/e release and due date SOTR Report (choose SOTR to list Project Report (choose project(s)) Subcontractor Ba (choose contract(s))	ojects' Milestones or Group ind dates to view upcoming PM is) : active subcontractors by contract) : active subcontractors by contract)
	(FM Staff Connection) Work Orders - Subcontrastor Basic Site Plan (layers not supported in some brown Reader or BlueBeam) SOTRS Links for SOTRs (subcontractor registration, training (choose contract(s)) Subcontractor Report (choose subcontractor(s) and active Course Report by Subcontractor (choose subcontractor(s), contractor	r Connection wsers; use Adobe 1g, and SOTR procedures) re/inactive JList status) ctor (a), and/or skill(s))	Facilities PMs, Pro Upcoming PMs for (select group, start/e release and due data SOTR Report (choose SOTR to list Project Report (choose project(s)) Subcontractor Ba (choose contract(s)) Subcontractor Tr (choose subcontract	ojects' Milestones or Group and dates to view upcoming PM es) esctive subcontractors by contract) edge Status Report sining Taken or Required sor(s) end/or contract(s))

Go back to <u>https://www.jlab.org/facilities/handylinks</u>, then click on the "**My Work Orders**" link. If not already logged in, you will then be prompted to enter your **Maximo username and password**.

### **Access Work Orders in Maximo**

EM - Admin EACH ITIES MANAGEMENT	1											
						09.0	hanno Contont/Lavout 👜	Dienlav Sottinne 🦉	@ Croato Now Tomplato	A Modify Evis	sting Tomplato	Undate Start Center
Favorite Applications	/**	Pending Servio	e Requests	Filter > 🖍 📋 🖪 🖡	•	ua c	nange content Layout 🦏	Dishidi serringa di	Create new remplate	an mouny LAN	and remplate we	
		Affected User	Owner Group	Reported Date	Service Request	<u>Status</u>	<u>Summary</u>				I	arget Finish
Service Requests											[	
		Tina Menefee	FMENG	4/4/19 2:31 PM	70471	PENDING	3 swing gates needed i	for fixed ESR 1 ladd	ers		4	/18/19 12:00 AM
		Tina Menefee	FM	3/18/19 3:43 PM	70170	PENDING	Relocate eyewash				3	/22/19 12:00 AM
Work Order Tracking		Tina Menefee	FMENG	3/22/19 12:13 PM	70257	PENDING	No room identification	on the FM maps or t	he actual door for the ARC	CElevator roon	n 4	/19/19 12:00 AM
KPI List	/ 22	Set Chart Option	<u>15</u>									1 - 3 of 3
		My Service Re	uests - accep	ted by me 🐺 Filter 🗤	A D G A							/**
		Owner Group	Se	rvice Request	<u>Status</u>		Summary		Supervisor		Target Finish	
		FMM	64	197	WORKING		Supplemental Heater Neede	ed	360801		12/31/18 12:00 AM	
		Set Chart Optio	<u>15</u>									1 - 1 of 1
		My Workorders	- Either lead	or owner 😽 Fiter > 🕷	10 G A							/*1
		Description				Lead	Service Request	<u>Status</u>	Target Finish	Vendor	Work Group	Work Order
		Training Hours f	or Facilities Ma	nagement Staff FY'19		Bob Sperlaz	za –	APPR	9/30/19 12:00 AM		FMO	379091
		Non-Project spe	cific Project Me	etings and Events FY'1	9	Bob Sperlaz	18	APPR	9/30/19 12:00 AM		FMO	379092
		Set Chart Optio	<u>15</u>									1 - 2 of 2

The **Maximo Start Center** will automatically load the **Service Requests** at the top along with the open work orders lower down for your work group. You can either select a work order from the work order list which will directly open the work order edit screen or select the "**Work Order Tracking**" link on the left. The Work Order search screen will then be displayed as shown on the next page.

### **Entering the Work Order # in Maximo**

Û Work (	Order Tracking									<mark>₽  <u>B</u>ulletins: (0)                                   </mark>	To <u>IM R</u> eports	n Start <u>C</u> enter A <u>P</u> rofil	e <sup>¥</sup> <u>S</u> ign Out <b>?</b>	<sup>Help</sup> IBM,
Query	Find Work Order	<b>A</b>	Select Action	V	1 🛛 🖉	00	🗸 🖉 🔝							
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Work Order	SR#	Description	Location		Priority Work Gr	oup	Work Type	Owner	Lead		WO Status	Target Finish	SR Stat	tus
	P			>>		P						P	6	
			To find records	s, use the filter field	s and then press Ent	er. For more se	arch options, use the	Advanced Search	n button. To enter a new rec	ord, select the Insert icc	on in the toolbar.			

In the box marked "**Work Order**" – you can type in a specific work order number to edit. You can also type in any of the other blank fields or click on the "**Advanced Search**" link to specify other search criteria.

Press the "Enter" key to see the **work order search results listings** displayed as shown on the following page.

### Selecting the Work Order # in Maximo

Ê	Work O	rder Tracking						<sup>₽</sup> <u>B</u> ulletins: (0) <i>ሶ</i>	' <u>G</u> o To <u>I⊿ R</u> eports	🕅 Start <u>C</u> enter	≜ <u>P</u> rofile ¥	<u>S</u> ign Out	? <u>H</u> elp	
Que	IŊ	Find Work Order	🔊 🔻 Select Action	M 🕴 🛛	• 🗘 🗸 📀 📠									
ĥ	Advanced Se	arch 🔻 🎴 Save Query 🕚	🗸 🦨 Bookmarks											
Wo	ork Orders	¥ Filter > 👸 🏢 🚯 👘	↓   ◆ 1 - 1 of 1 ◆										By <u>Down</u>	oad
Wo	rk Order	<u>SR #</u>	<u>Description</u>	Location	Priority Work Group	Work Type	Owner	Lead	WO Stat	JS	Target Finish	SR Sta	itus	
178	8487	P		>>	P					P		8		
178	3487	53266	Penetration Leak Repair	999	1 FMENG	CP	Ed Winslow	Ed Winslow	APPR		5/3/20 10:40 AI	I WORK	ING	
4		7												

Click on the **work order number** to open the work order. A "**Work Order**" tab with work order details will be displayed along with other tabs at the top available for additional information to be entered as shown on the following pages.

Click on "**List View**" to exit the work order and display the work order search results listings again.

### "Work Order" Tab in Maximo

Work Order Tracking					Bulletins: (0) A Go To Ma Reports A Start Center & Profile & Sign Out ? Help	IN.
Query 🖌 Find V	Vork Order 🛛 👦 🤜 Select Action 💽 🎽		<			
List View Work Order	Plans Actuals Log Reasons Assignment	s Service Address Map				1
省 Please either charles	d or vendor to assign this workorder to. Be sure to hit the save button in the	menu bar after making edits.				
PRINTING. THE	any pop-up blockers. You WILL NOT be able to print reports if pop-ups are	being blocked.				
To print, use pa	the type of printout you want in light blue toolbar. Once new window/tab op	ens with print version of report, press th	e print icon in the light blue tool	bar again.		
You will see a	for the print format. Select pdf or report will not output correctly. ther follow dialog or press the print icon in the pdf toolbar.					
Workorder Information	3 . F F	-	Priority			
Work Order	178487 Penetration Leak Repair		Asset/Location Prio	rity		
Location	999 🔉 Accelerator Tunnel		Prio	rity	1 D Low	
Asset	»	<b>1</b>	Priority Justificati	on	<b>a</b>	
Parent WO	>>		Risk Assessm	ent		
Classification	FM \ FMI \ ARCHIT \ STRUC \ STRUCR		General Information			-
Class Description	Repair/Maintenance		<u>Attachments</u>	0		
Detalls	Parent work order to repair leaking penetrations at stations 26+91, 25+96 (both wave guide) and 7+56 that just needs to be reinjected.		WO Status	APPR		
	- Schedule Considerations -		Status Date	11/19/15 10:	59 AM	
	-Explaination: Complex project. Design over the winter with execution in		Work lype		- P	- 1
	Summer to SAL		Originating Record	53266		
	- EH&S Considerations -		Oria Record Type	SR		
	-Minimum Access Training Requirements: Rad Worker 1, ODH 1, ODH 2 -Other Requirements or Special Conditions: Work >6 Et above ground		SR Status	WORKING		
			Work Group	FMENG	»	
			Owner	11753	» Ed Winslow	
Reported By	Ed Winslow		Lead	11753	» Ed Winslow	
Reported By Location	28_1.73		Vendor		»	
Reported Date	11/19/15 10:54 AM 🛛 🐻		Need Reassign?			_
On Behalf Of	Ed Winslow		Subcontractor Information	[		-
Phone	7316		Estimat	Task Order e Required		
On Behalf Of Location	28_1.73		Pavi	ment Basis		
Safety Checklist		-	Refrigerant	Added Amt		
Review completed safety check	dist		Refri	gerant Type		
			Refrigerant Rec	overed Amt		
			Estir	nated Cost		
				Contract		
				Craft	P	

The "**Work Order**" tab provides most of the information needed to identify the work being done and who is working on it, including the title, description, location, status, work type, work group, owner, and lead. At the bottom is a summary of PO and PR line items and totals from the "**Actuals**" tab.

The other tabs we use are: **Plans, Actuals, and Log**. Click on "**Plans**" to add child work orders if this work order is a parent project (CP) work order. Click on "**Actuals**" to add the PO and PR line items, labor hours, and/or materials costs. Click on "**Log**" to add log entries describing the work performed, issues, delays, etc. See the following pages for further details on these tabs.

### "Plans" Tab in Maximo

Work Order Tracking								<mark>⊎</mark> <u>B</u> ulletins: (	0) <i>№</i> <u>G</u> oto Ш <u></u>	<u>R</u> eports   ₱ Start <u>C</u> e	enter 🔺 <u>P</u> rofile	X Sign Out	Help IEM.
Query 🖌 Find		Select Action	v 👌 🗟	2 🔍 🕴 🗘	🗸 🖉 🔝								
List View Work Order	Plans Actual	s Log	Reasons Assignments	Service Address	Мар								
Work Order 3742 Parent WO	235 Building 89	Renovation	Þ					Site JLAB	STE1		Status CC	MP	
Children of Work Order 37423	5   🕽 Filter > (%   🗇   🔶 )	🗼   🧼 1 - 3 of 3 🔶											B) Download   =
Sequence Re	ecord 🍦 💦 👂	tord Class	Summary			Lead		Display Name	Location	<u>Asset</u>		<u>Status</u>	
) 39	19625 👋 👋 🐇		89 Renovation (A/E Design)		10	19423	>>	Christine Snetter	89	>>	>>	COMP	👘 🗘 🗊
> 39	9626 <sup>(II</sup> »	RKORDER	89 Renovation (CM A/E)		1	313271	>>	Thomas Renzo	89	>>	>>	COMP	🗘 🗊
> 39	9627 <sup>()</sup> » W	ORKORDER	89 Renovation (Construction)		2	313271	>>	Thomas Renzo	89	>>	>>	COMP	🗘 î
									Select Assets	Select Locatio	ns Sele	ct Work Orders	New Row
Tasks for Work Order 374	ter > (a   a   + +	0 - 0 of 0											
	Sequence 🌲		<u>Task</u> 🌲 <u>Summary</u>			<u>E</u> s	stimated Du	ration <u>Status</u>	<u>Owner</u>	<u>0</u>	wner Group		
					There are no rows to (	display.							
Labor Materials	Services Tools												
Labor   🕨 Fiter 🗚   🗇   🔶	0 - 0 of 0												🖪 Download   🗖
Task	Crew Type	Craft	Skill Level	Vendor	Quar	ntity <u>Labor</u>	Crew			Regular Hours	Rate		Line Cost
					There are no rows to	display.							
										Select C	Crew Type	Select Craft	New Row

The "**Plans**" tab allows you to create **child work orders** linked to the current work order (parent) by clicking on the "**New Row**" button at the bottom right side of this section (Children of Work Order ...). As you create the child work order(s), click on the "**Save**" symbol at the top in the light blue bar.

Click on the **double right arrows to the right of each child work order #** to open them. Child work orders can have the following work types: CMGT (Construction Management), CONST (Construction), DSGN (Design), SOW (Scope of Work), and STDY (Study). Be sure to set the work group and child work order owner and lead as well. Press the "**Return**" button at the top right corner to return to the parent work order.

### "Actuals" Tab in Maximo

Work Order Tracking			₩ <u>B</u> u	lletins: (0) 🎓 <u>G</u> o To 🖽 <u>R</u>	eports 👘 Start <u>C</u> ente	r 🔺 <u>P</u> rofile 🗮 <u>S</u> ign Out	?Help
ry Find Work Order Select Action	💌 🛃 🗟 🗶 🍳 🖗	😂 🗸 🥥 📖 🕛 U U					
List View Work Order Plans Actuals Log Reasons	Assignments Service Addres	s Map					
Work Order 178487 Penetration Leak-Repair Parent WO >>	<b>a</b>		Site	JLABSTE1	Sta	tus APPR	
rchase Orders   🎽 Filter » 🚬 📄 👘 🍎 🔷 1 - 4 of 4 🖉							By Download
m Description		Line Cost Required Date	Order Date	PO	(	Company	Status
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WINSLOW >>> Ed Winslow	2	4:00	178487				ť
				Enter Time By Crew	Select Labor	Select Planned Labor	New Row

The "**Actuals**" tab is populated with PO and PR line items from Costpoint once they are associated with the work order # in the JLab Reguisition System - <u>https://misportal.jlab.</u><u>org/reqs/goHome.do</u>.

At the bottom of the page are **Labor, Materials, Services, and Tools** tabs. We use the Labor and Materials tabs to record labor hours and materials costs. Click on the "**New Row**" button to create new line items on the applicable tab. For Labor, the Labor field requires your username, fill in Memo with a labor description, and put in the labor hours. For Materials, first select the "**Material**" type, then put in a vendor, purchase card type, description, quantity, and unit cost.

The Actual Labor Cost and Actual Material Cost values are recorded along with the PO Cost to provide the Total Cost of the work order. These fields are located just below the "Purchase Requisition" section and above the "Children of Work Order ..." section.

### "Log" Tab in Maximo

Work Order Trackin	ng				_	P <u>B</u> ulletins: (0)	rts 🦸 Start <u>C</u> enter 🔺 <u>P</u> rofile 🎽 <u>S</u> ign Ou	t ?Help IBM.
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								New Row

The "**Log**" tab allows you to record communications with the service requester and provide status updates about the work progress, rescheduling, completion, deferral, or cancellation.

### **Completing a Work Order in Maximo**

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									OK Cancel		

Once the work is complete, click on the **Status Change** icon at the top on the light blue bar to set the work order to "**Complete**" for PMs or "**Field Work Complete**" for all other work types. Add a description of the status change in the Memo field. Then click on "**OK**"

to change the work order status. You can also click on the 🎽 to complete it.

Actuals may still be added until the work order has been set to "**Complete**". If changes are needed after that, the work order will need to be reopened.

For completions, you will be asked if you want to close the service request as well. Select "OK" only if all of the work for this task has been complete.